Practice Administrator User Role

This week of Care Coordination Tool training will focus on several aspects of the tool including the **Practice Administrator User Role**.

After this self-guided training, you should be able to perform the following functions:

1.1 View Population Health Provider Dashboard

1.2 View and Edit Member Summary Data

1.3 Manage Care Staff

- Update or Inactivate Care Staff Users

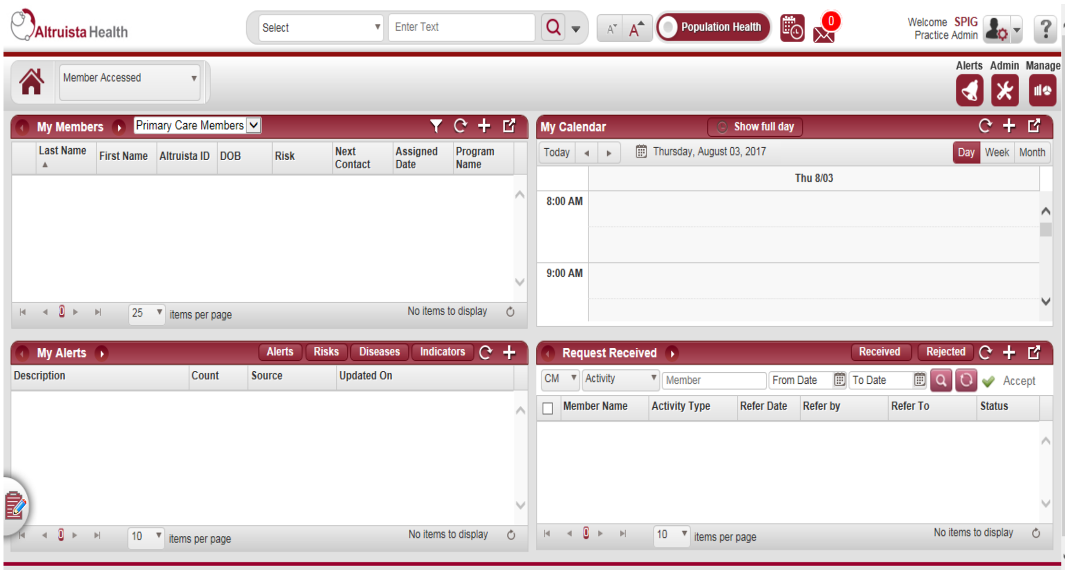
1.4 Reset Your Password

1.5 Assign a Member's Care Team

1.6 Exercise: Assign a member to yourself (only applicable for Practice Administrator and Care Team Manager user roles)

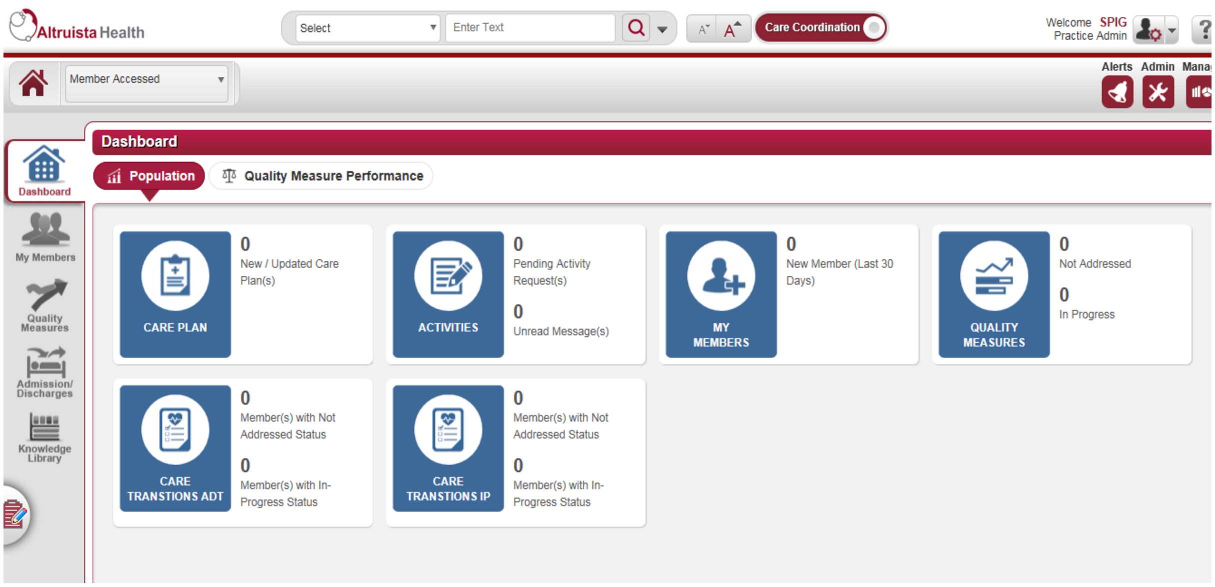
1.1 View Population Health Provider Dashboard

1. When a **Practice Administrator** logs in to the Care Coordination Tool, the Population Health view appears as shown below.



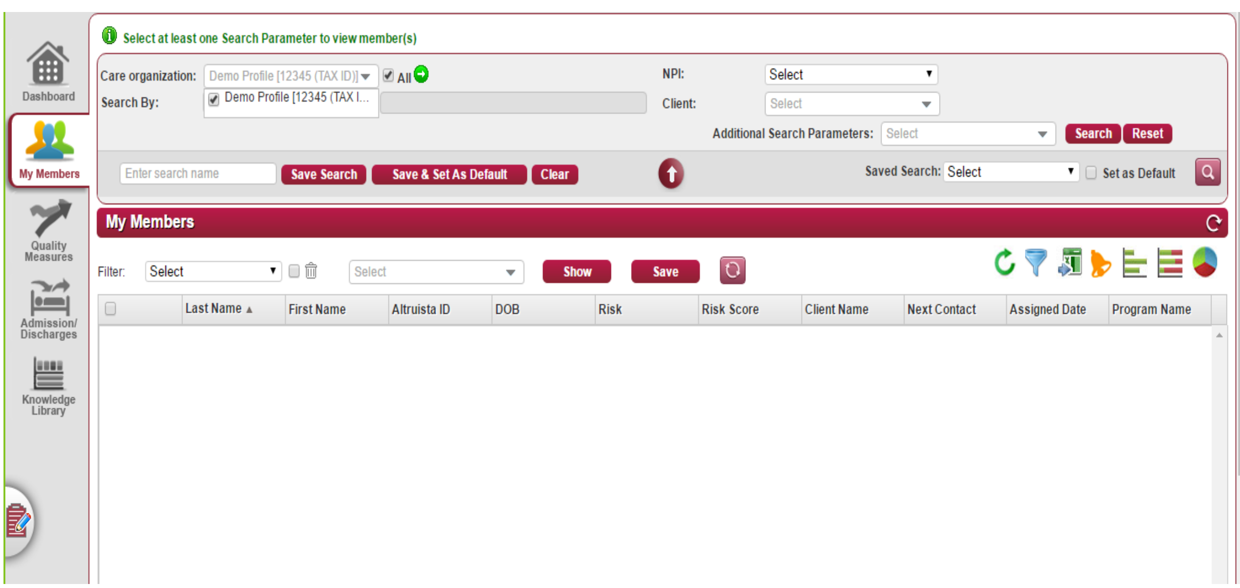
Note: The Population Health Dashboard view for Practice Administrators (as well as Care Coordinators and Care Team Managers) is different than a provider's view; this dashboard view includes information about My Members, My Calendar, My Alerts, and Requests Received.

2. In order to switch to the same Population Health view as a provider, click on the **Population Health/Care Coordination toggle button** on the top center of the screen.

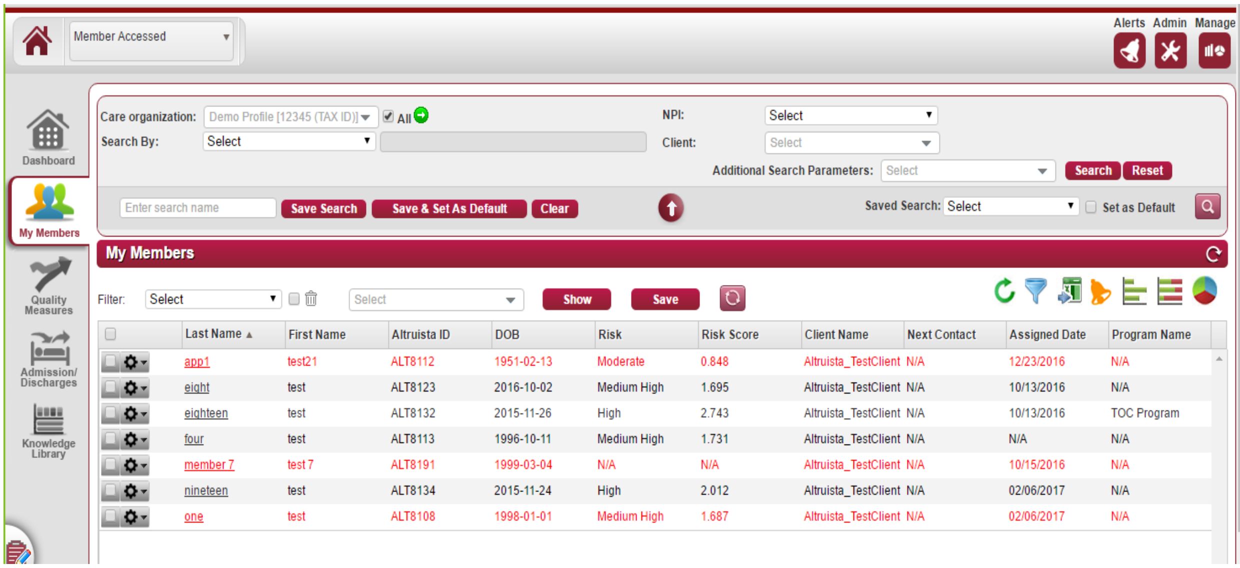


1.2View and Edit Member Summary Data

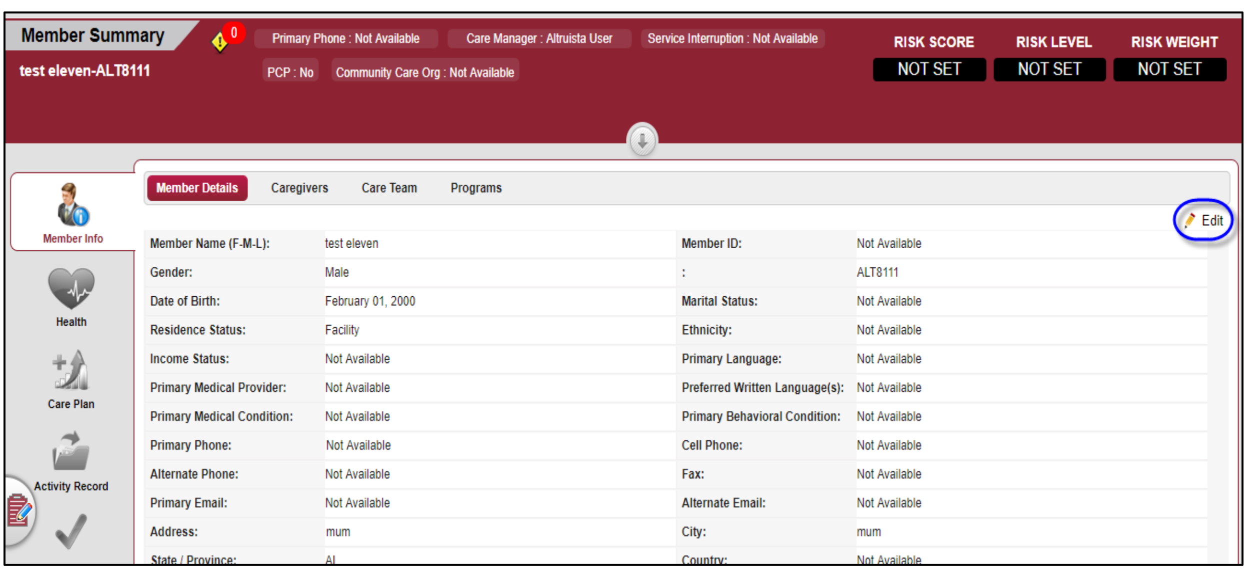
1. The Practice Administrator can view a member's data associated to the Practice Taxpayer Identification Number(s) (TIN) for which they have access to.
    a. Select the **My Members** tab and in Global Search, select a **Practice TIN** from the **Care Organization** drop-down.



b. Click on the **Search Icon** to view members that are associated to the selected TIN.



c. Click on Member's Last Name **hyperlink** to view the member's data in the **Member Summary** section.

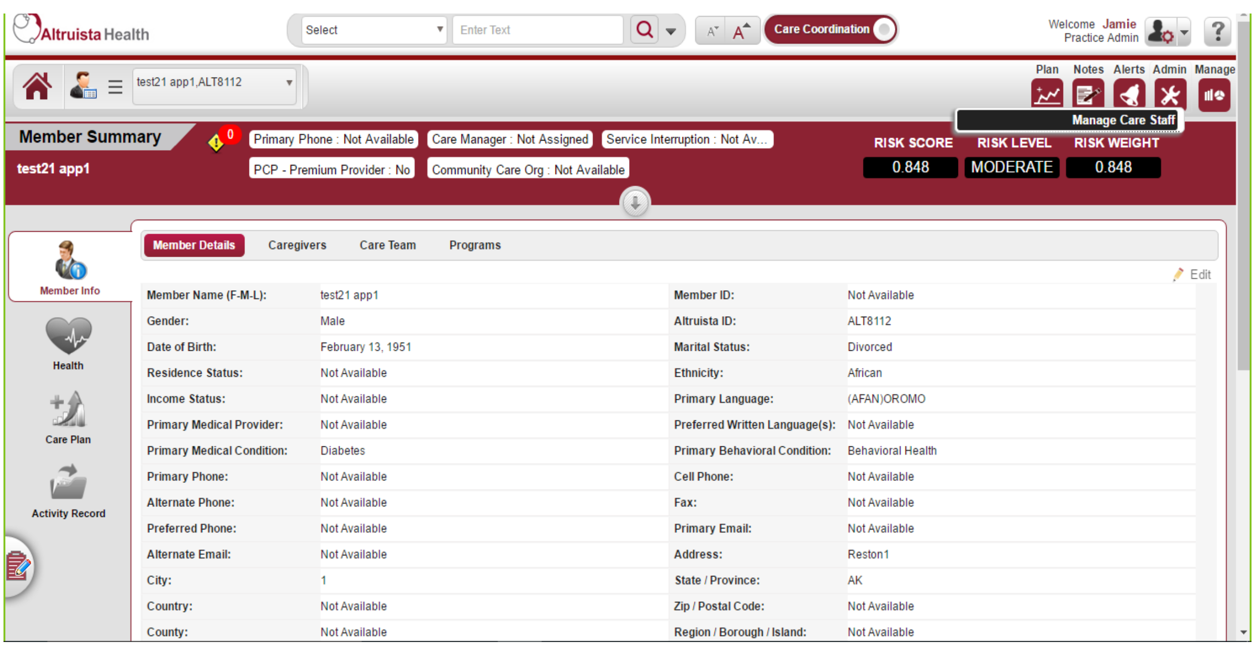


<u>Note</u>: In the **Member Summary** section, the Practice Administrator (**as well as any other user role**) can view and also edit member's demographic and medical information by clicking the **Edit** button. This is helpful because each member has only one patient record in the tool. Therefore, if one provider knows that member's updated phone number and inputs it in their member summary section, another provider can see that new phone number when they log into the tool. **When editing member information, all required fields need to be filled out in order to save changes successfully.**

1.3 Manage Care Staff

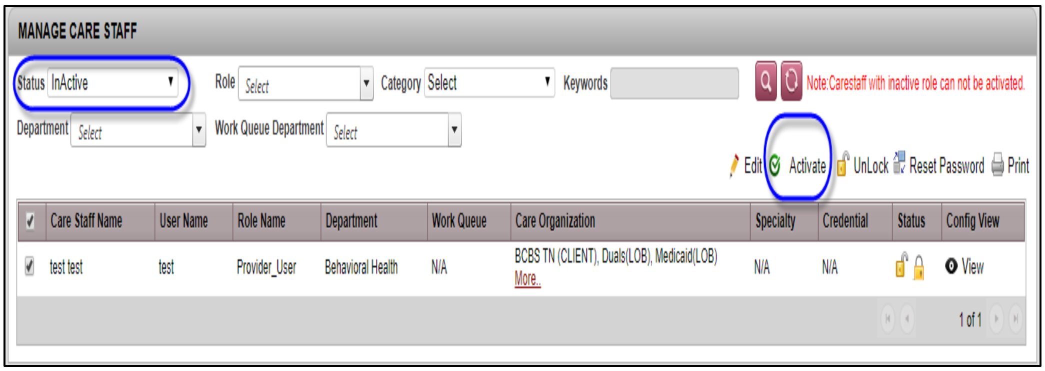
1. The Practice Admin can update/inactivate care staff user(s) assigned to their practice where the Practice Admin has access.

   a. Click on the **Admin** icon  and select **Manage Care Staff** from the drop-down menu.

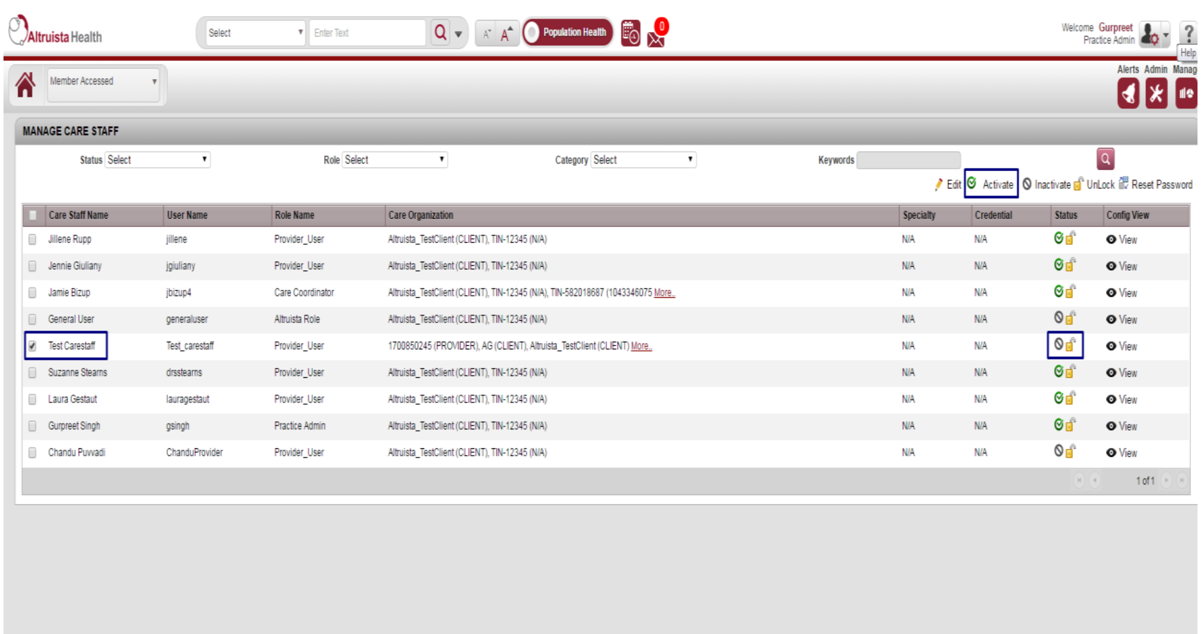


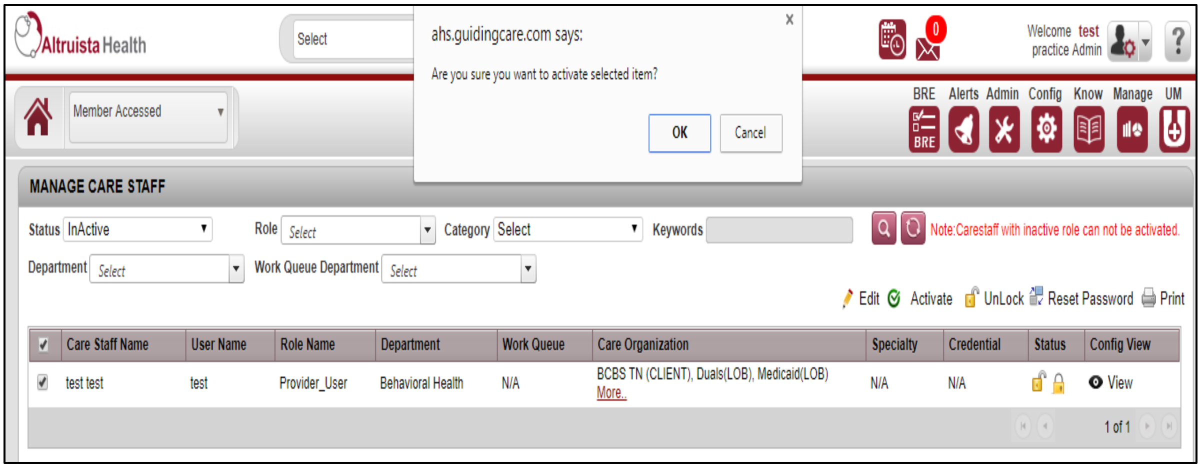
<u>Note:</u> The Practice Administrator will not be able to search or view any member data that is not associated to the TIN(s) where the Practice Administrator has access.

a. In the **Manage Care Staff** panel, select **Inactive** from the **Status** drop-down list to view the Care Staff members in Inactive status. **Note**: By default, system displays only Active records.

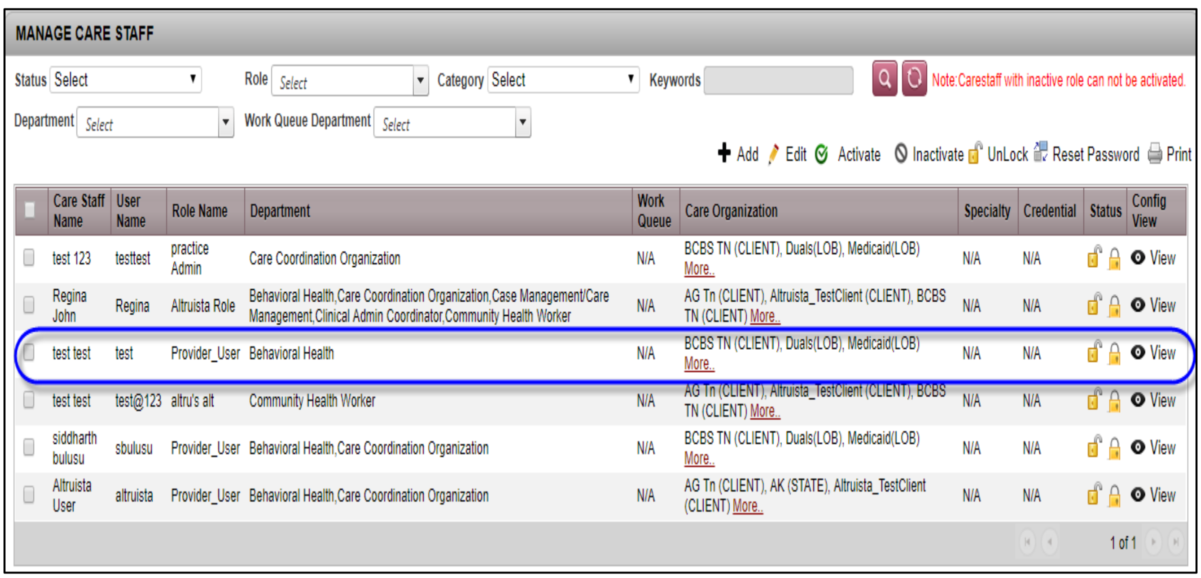


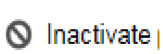
b. Select a care staff member by selecting the check mark box next to the Care Staff Name, clicking on the **Activate** icon to change the status from **Inactive to Active** for the care staff member, and clicking **OK** when prompted for confirmation.





c. After clicking on the **Activate** icon, the status of the care staff member is updated from **Inactive** to **Active**.

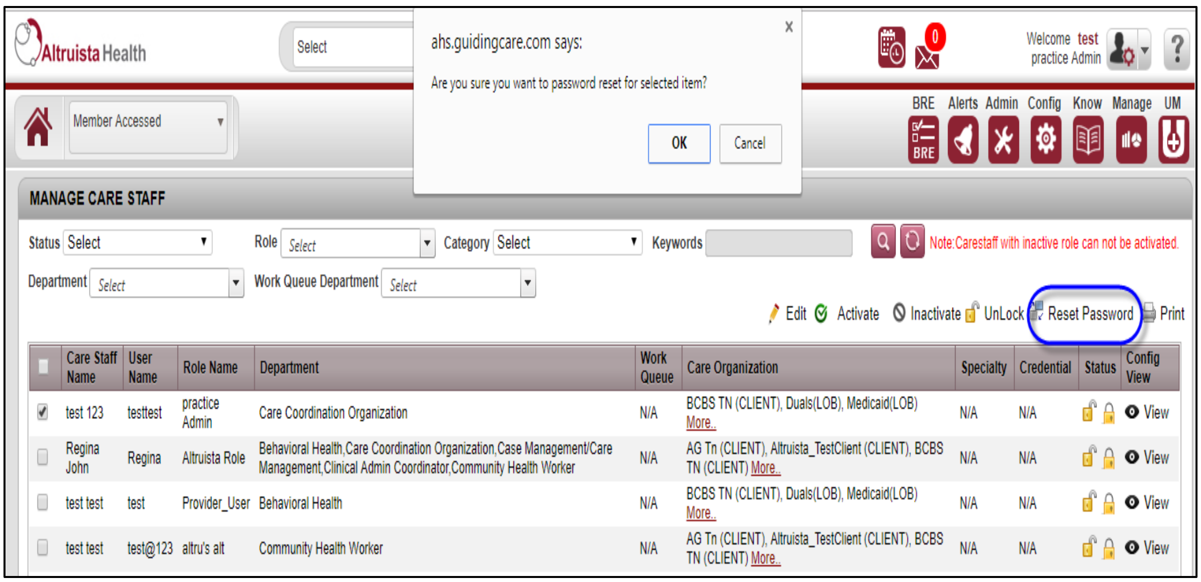


__Note:__ The Practice Admin can also change the status of a care staff member from **Active** to **Inactive** by following the same steps shown above in the screenshots and clicking on the **Inactive** icon 

. If the care staff member being inactivated has members or activities assigned to him/her in the tool, a Care Staff References window will populate allowing the practice administrator to refer the members or activities to other, active care staff members.

1.4 Reset Your Password

1. In the **Manage Care Staff** panel, the Practice Administrator can reset care staff members' passwords.
   a. Select a care staff member's name and click the **Reset Password** icon. When prompted to reset the password, select **OK**.



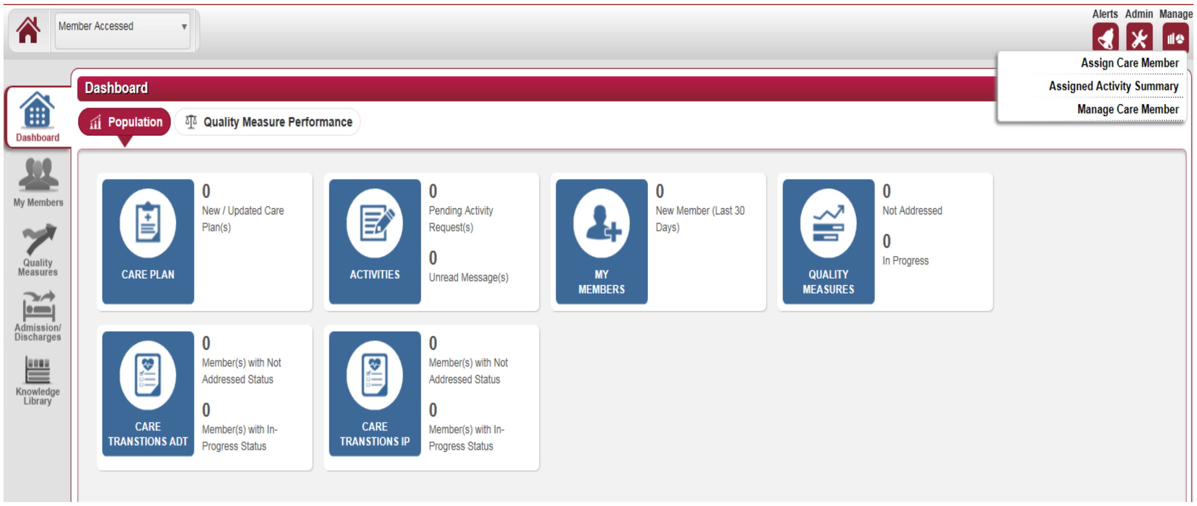
Note: If a care staff member has locked themselves out of their account, the practice admin will first need to click the check box beside their name and choose the **Unlock** button 

. Then they will be able to activate the account by following the steps above.

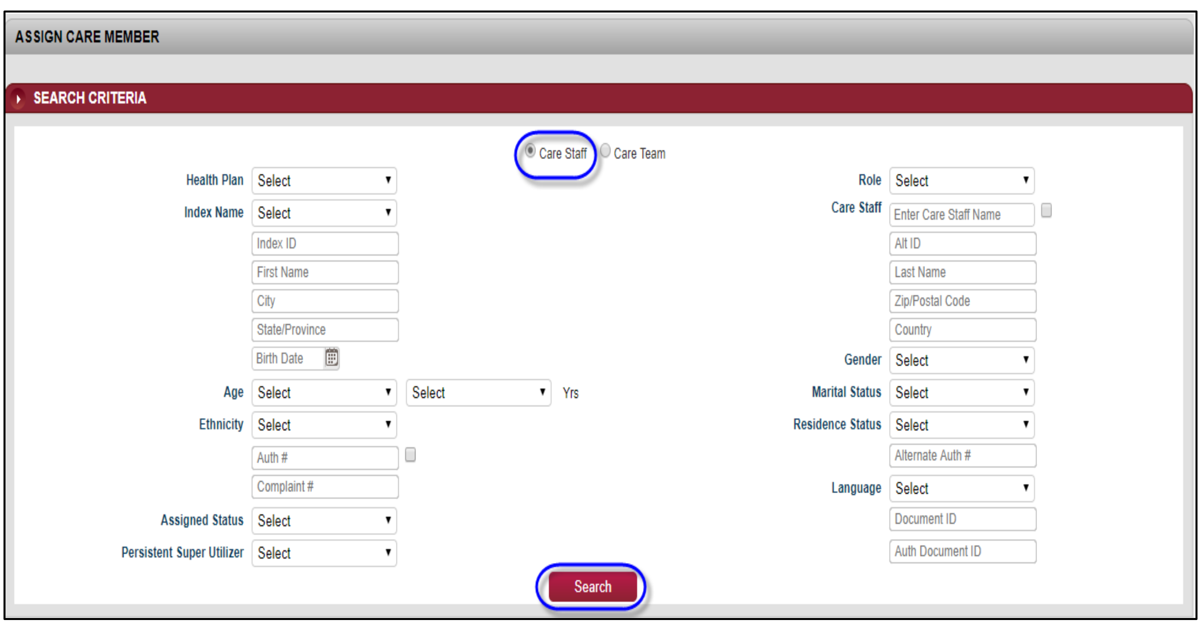
1.5 Assign a Member's Care Team

1. The Practice Administrator (and Care Team Manager) user role can assign and re-assign Care Coordinators and Care Team Managers to a Member's Care Team.

a. From any screen, click on the Mange Icon Manage and select **Assign Care Member** from the drop-down menu.

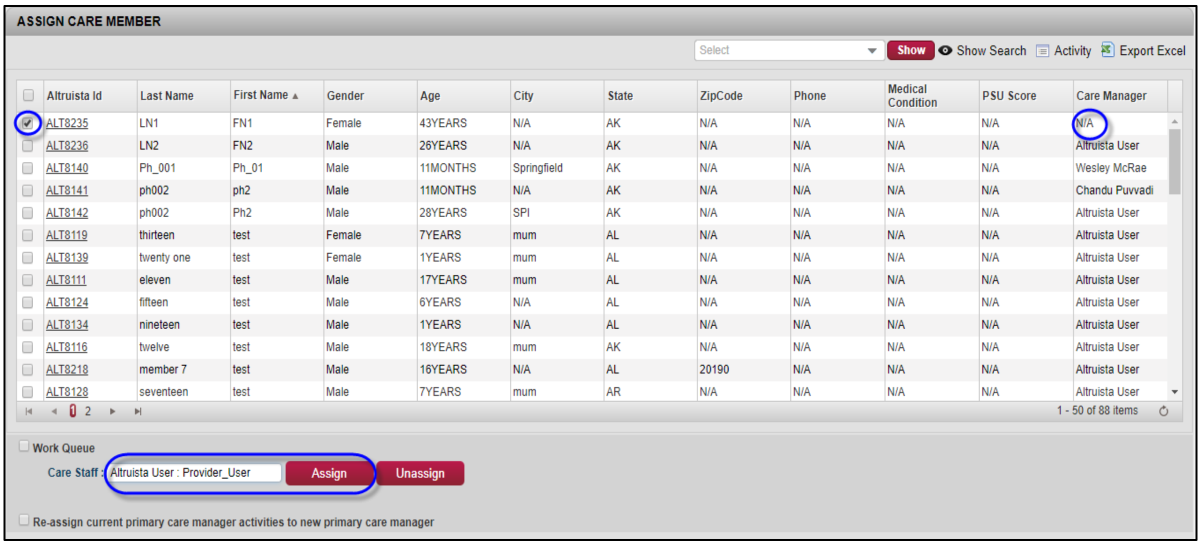


b. In the **Assign Care Member** panel, select the **Care Staff radio button** and click on search.

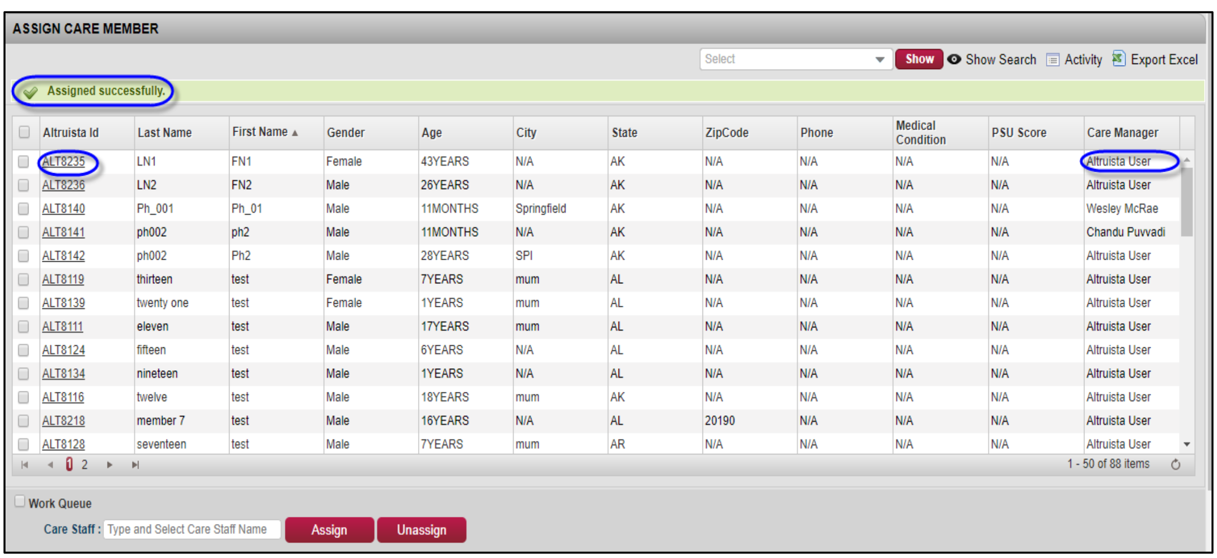


2. In the example shown below, the member selected currently is not assigned a Care Manager.

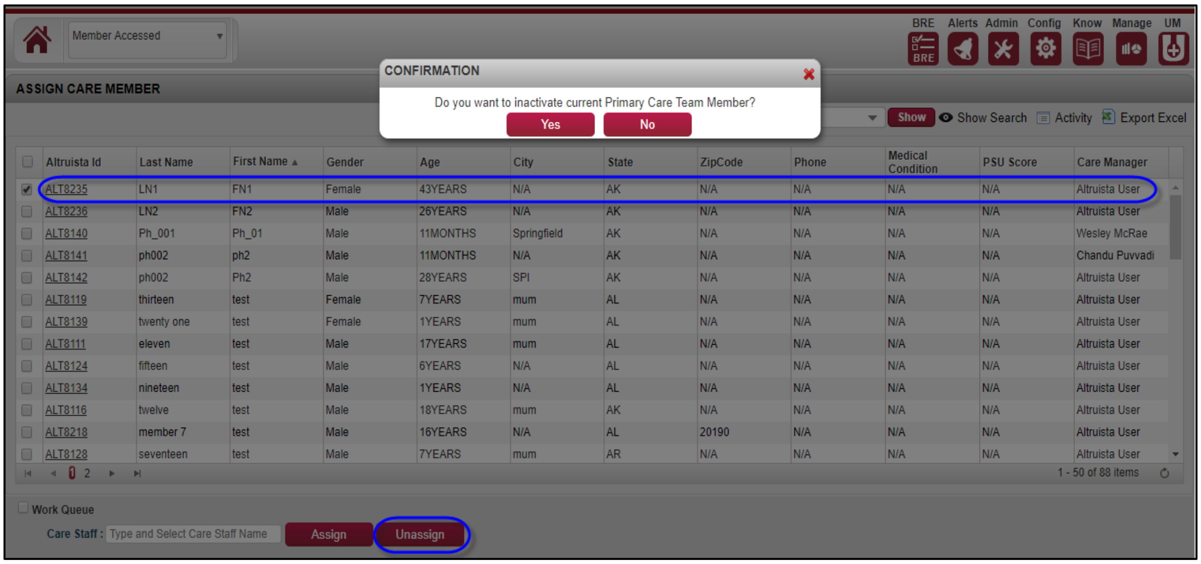
    a. To assign a Care Manager, select the member by **clicking on the checkbox** next to the Altruista ID, and enter the name of the care staff member at the bottom left corner of the screen.

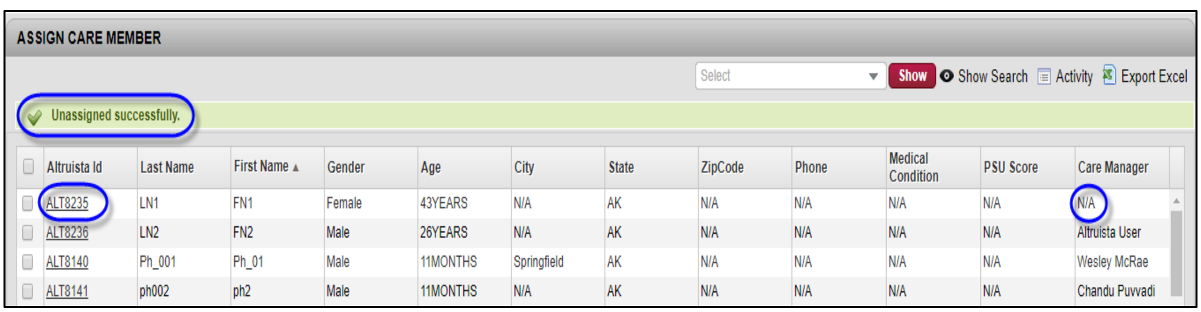


    b. After clicking on the **Assign button**, the Practice Administrator successfully assigned Care Manager Altruista User to the member:



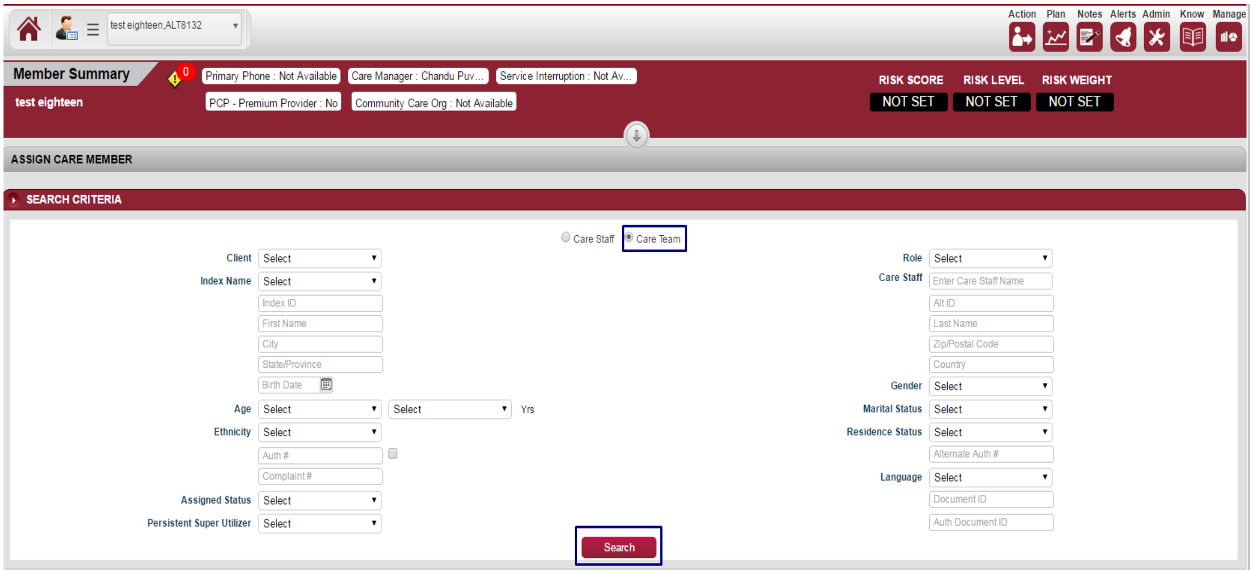
c. To unassign Care Manager Altruista User, select the same member, and click on the **"Unassign" button** on the bottom right corner of the screen. When prompted to confirm the change, select "Yes".





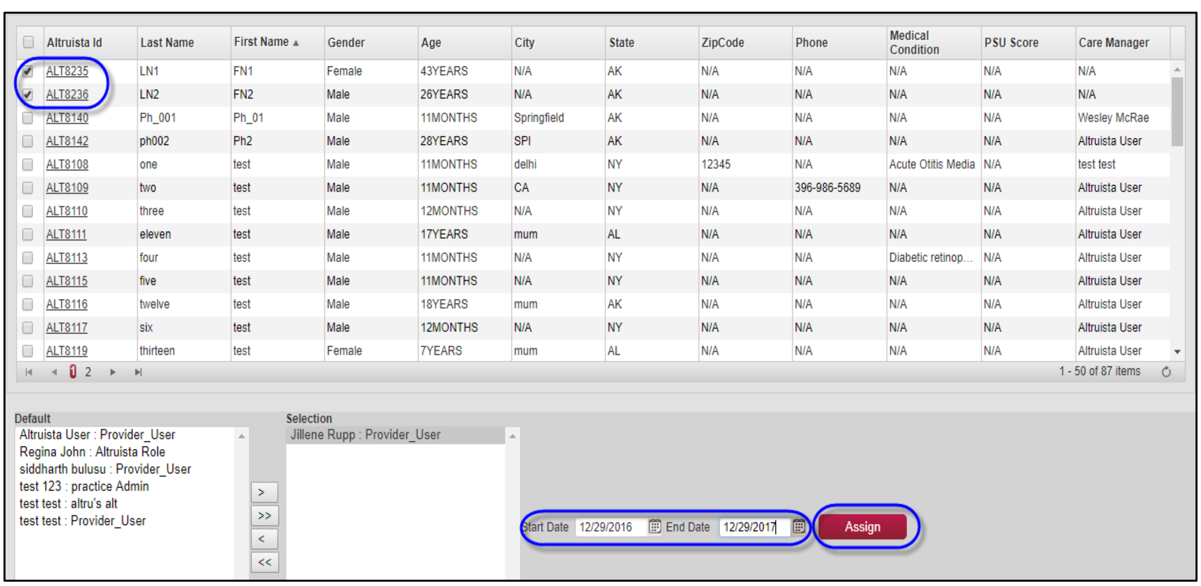
3. The Practice Administrator can group members together and assign to a Care Coordinator or Care Team.

   a. In the **Assign Care Member** panel, select the **Care Team radio button**, and click on **Search** to filter members. **Note**: Other search criteria such as City and Zip Code are available to filter members.

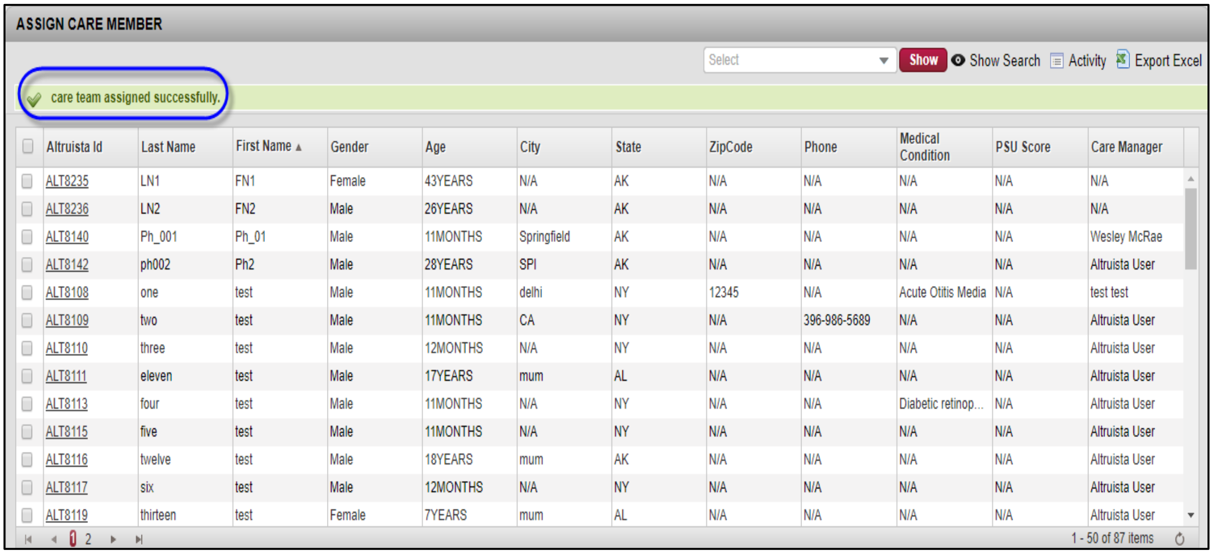


b. Select a Member or Members (you can multi-select and group members together) to assign a Care Coordinator to the members' Care Team.

c. In the example below, the Practice Administrator has selected Care Coordinator Jillene Rupp (by selecting her name from the **Default** window and using the **>** button to move it into the **Selection** window) from 12/29/2016 to 08/16/2017.



d. Click on the **Assign** button. Now the Care Coordinator Jillene Rupp is assigned to the Care Team for the selected members.


ASSIGN CARE MEMBER

Select | Show | Show Search | Activity | Export Excel

care team assigned successfully.

Altruista Id	Last Name	First Name	Gender	Age	City	State	ZipCode	Phone	Medical Condition	PSU Score	Care Manager
ALT8235	LN1	FN1	Female	43YEARS	N/A	AK	N/A	N/A	N/A	N/A	N/A
ALT8236	LN2	FN2	Male	26YEARS	N/A	AK	N/A	N/A	N/A	N/A	N/A
ALT8140	Ph_001	Ph_01	Male	11MONTHS	Springfield	AK	N/A	N/A	N/A	N/A	Wesley McRae
ALT8142	ph002	Ph2	Male	28YEARS	SPI	AK	N/A	N/A	N/A	N/A	Altruista User
ALT8108	one	test	Male	11MONTHS	delhi	NY	12345	N/A	Acute Otitis Media	N/A	test test
ALT8109	two	test	Male	11MONTHS	CA	NY	N/A	396-986-5689	N/A	N/A	Altruista User
ALT8110	three	test	Male	12MONTHS	N/A	NY	N/A	N/A	N/A	N/A	Altruista User
ALT8111	eleven	test	Male	17YEARS	mum	AL	N/A	N/A	N/A	N/A	Altruista User
ALT8113	four	test	Male	11MONTHS	N/A	NY	N/A	N/A	Diabetic retinop...	N/A	Altruista User
ALT8115	five	test	Male	11MONTHS	N/A	NY	N/A	N/A	N/A	N/A	Altruista User
ALT8116	twelve	test	Male	18YEARS	mum	AK	N/A	N/A	N/A	N/A	Altruista User
ALT8117	six	test	Male	12MONTHS	N/A	NY	N/A	N/A	N/A	N/A	Altruista User
ALT8119	thirteen	test	Female	7YEARS	mum	AL	N/A	N/A	N/A	N/A	Altruista User

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1.6 Exercise: Assign a member to yourself (only applicable for Practice Administrator and Care Team Manager user roles)

1. In the Assign Care Member panel, enter in your organization's zip code as a search criterion and click Search.

2. For a member with no care staff assigned (indicated with a N/A status under the Care Manager column), select the check box on the left side of the member's name.

3. Search your name in the Care Staff search on the bottom left side; select your name and click "Assign".

a. Observe that you have you been successfully assigned to the member with the green confirmation message on the top of the panel.